

**Draft Summary of the Recreation and Socioeconomics Work Group Meeting
Oroville Facilities Relicensing (FERC Project No. 2100)
January 30, 2002**

The Department of Water Resources (DWR) hosted a meeting for the Recreation and Socioeconomics Work Group on January 30, 2002 in Oroville.

A summary of the discussion, decisions made, and action items is provided below. This summary is not intended to be a transcript, analysis of the meeting, or to indicate agreement or disagreement with any of the items summarized, except where expressly stated. The intent is to present a summary for interested parties who could not attend the meeting. The following are attachments to this summary:

Attachment 1	Meeting Agenda
Attachment 2	Meeting Attendees
Attachment 3	Flip Chart Notes
Attachment 4	Lake Oroville Recreation Plan - Accomplishments
Attachment 5	Study 7: Reservoir Boating Survey
Attachment 6	Study 9: Existing Recreation Use Study
Attachment 7	Study 13: Recreation Surveys

Introduction

Attendees were welcomed to the Recreation and Socioeconomics Work Group meeting. Attendees introduced themselves and their affiliations and the desired outcomes of the meeting were discussed. The meeting agenda and list of meeting attendees are appended to this summary as Attachments 1 and 2, respectively. Meeting flip chart notes are included as Attachment 3.

Action Items – December 6, 2001 Recreation and Socioeconomics Work Group Meeting

A summary of the December 6, 2001 Recreation and Socioeconomics Work Group meeting is posted on the relicensing web site. The Facilitator reviewed the status of action items from that meeting as follows:

Action Item #R38:	Present DWR recreation budget for Oroville at the Plenary Group meeting on December 11, 2001. Subsequently, present recreation budget to the Recreation and Socioeconomics Work Group on January 30, 2002.
Status:	Dave Ferguson first discussed the Plenary Group presentation focused on the list of interim projects DWR identified as moving forward to implementation. While the presentation given at the Plenary Group meeting was not available for this meeting, the facilitator reminded the participants that it would be posted along with the Plenary Group meeting summary on the website. Dave Ferguson with DWR reviewed a previous draft of the presentation, outlining the four categories of interim projects: (1) DWR immediate projects; (2) projects that need additional work; (3) projects that need additional studies; and (4) projects under a continual development process. Some concerns were expressed by participants regarding the ranking of some projects that seem to need environmental documentation and the potential for one project, a parallel bike trail to be held up due to its apparent location on PG&E land, requiring an easement for development. The future development of this trail project is unclear due to PG&E bankruptcy issues and the probable need for future environmental review under CEQA. This prompted one participant to recommend that "checkpoints" be developed to avoid obstacles to DWR implementing the interim project process. The Facilitator agreed to convey this recommendation to Tom Glover, DWR chief of the Oroville Field Division and suggested that proponents of

specific identified interim projects would need to coordinate with DWR staff to provide additional detail as appropriate.

Dave Ferguson developed a list of Operation and Maintenance (O&M) projects for the Lake Oroville Recreation Plan during the period 1993-2000 (see Attachment 4). The handout is organized by expenditures at Lake Oroville facilities, Thermalito Afterbay facilities, North Thermalito Forebay facilities, and South Thermalito Forebay facilities; it also notes projects excluded from the list, which reflects O&M projects. The projects included on the handout do not include Department of Parks and Recreation (DPR) or Department of Boating and Waterways (DBAW) projects.

A concern was raised related to the definitions and the use of budgetary terms used by DWR. One participant requested that the budget should be organized in annual terms and provided to Tom Wegge for incorporation into SP-R18; Dave Ferguson agreed to provide this information if necessary. A participant indicated that ORAC attempted to track expenditures at Lake Oroville several years ago to estimate economic impacts to the region, but stopped 2-3 years ago; Tom Wegge was not aware of this information, but agreed such data would be useful to acquire.

Action Item #R39: Double check that all approximately 150 recreation issues from the Scoping Document are tracked as to their fate.

Status: The Facilitator indicated that a draft "issue tracker" was included in the Study Plan package that was presented to the Plenary Group at their December 11, 2001. It consists of a master list of issues raised during the collaborative process. The issue tracker will be continuously updated throughout the relicensing process to identify the fate of issues raised. Copies of the study plan package may be requested by participants that haven't received one yet from Sue Larsen at DWR using the toll-free number printed on the bottom of the meeting agenda.

Action Item #R40: Confirm meeting summary postings.

Status: The Facilitator confirmed that the project meeting agendas and meeting summaries are being posted to the Oroville Relicensing web site in accordance with the Communications Protocol. In addition, a master meeting calendar for 2002 has been posted to the web site. The Facilitator requested that if the public is having difficulties in attaining this information to contact her directly.

Study Plan Task Force Update

Doug Rischbieter, DWR's Resource Area Manager for the Recreation and Socioeconomics Work Group updated participants on the Recreation and Socioeconomics Study Plan Task Force. The Task Force had met several times during the proceeding two weeks to revise the 19 draft study plans; the revised versions of these study plans were sent to the Work Group members.

Earlier versions of the study plans were submitted to the Plenary Group on December 11, 2001 as a part of the master set of study plans. At the January 2002 Plenary Group meeting, participants were asked to identify their 'heartburn' issues with those study plans identified as "critical-path. Critical Path refers to those study plans that either need two full years of data collection, have time-sensitive issues related to data collection, or will produce information needed for other study plans. Twenty-two study plans were identified as critical-path, including Recreation and Socioeconomics study plans SP-R7, SP-R9, SP-R13, and SP-R18. The Plenary Group participants identified 'heartburn' issues with twelve of the twenty-two study plans and referred them back to the appropriate Work Groups for resolution. SP-R9, SP-R13, and SP-R18 had heartburn issues associated with them. The remaining Critical Path Study Plans that had no heartburn issues identified were placed on a consent calendar for approval at the February Plenary Group meeting. SP-R7 placed on the consent calendar. Once the Work Groups have resolved the issues identified, revised Study Plans will be provided to the Plenary Group participants and reviewed at the February Plenary Group meeting for inclusion on the consent calendar for approval. Once

approved, these studies can begin implementation either through fieldwork and/or the development of more detailed implementation plans.

The goal is to resolve the heartburn issues identified for the Recreation and Socioeconomics Critical Path Study Plans and move them to the Plenary Group consent calendar for approval at the February 2002 Plenary Group meeting. The other, non-critical path study plans also need review by the Work Group prior to going back to the Plenary Group for approval. The plan for this meeting is to review these studies as time permits.

The Facilitator informed the Recreation and Socioeconomics Work Group that one significant general issue was raised at the Plenary Group meeting associated with the use of modeling in the study plans. A modeling review protocol Task Force was initiated, consisting of both modelers and non-modelers. The Task Force was charged with developing a generic modeling review protocol to ensure transparency, clarity, and confidence in all models to be used during the relicensing study plans, including the economic model(s) to be used in Study Plan SP-R18.

Critical Path Study Plan

John Baas, lead recreation consultant, led the discussion on revised study plans SP-R7, SP-R9, and SP-R13, which were distributed to the Work Group (see attachments 5,6, and 7). Tom Wegge, economic consultant, led the discussion of the revised study plan SP-R18; this study plan was not available in hard-copy format for distribution to the Work Group. Generally, the discussion of study plans SP-R7, SP-R9, and SP-R18 consisted of an overview summarizing the revisions that were made at the previous Recreation and Socioeconomics Study Plan Task Force meetings. The following additional comments were noted during critical path study plan review:

Study Plan 7 (Reservoir Boating Survey)

John Baas noted several revisions to this study plan, including global changes to the study area description, the inclusion of existing study summaries and a field implementation schedule, and added text related to boat types/locations. Several participants inquired about specific word choices within the study plan. The Facilitator responded that this meeting was not meant to wordsmith each study plan by section, but if participants had specific comments, they could submit them directly to the consultant team.

Study Plan 9 (Existing Recreation Use Study)

Revisions to this study plan focused on the timing of sampling days to avoid hot weather conditions (for certain activities like trail use) and the number of sampling days. One participant inquired as to the definition of a “recreation-visitor-day” and how it is used in the study plan. Doug Rischbieter informed the Work Group that there are two ways of defining a “recreation-visitor-day”: (1) a 12-hour time period engaged in recreational activities, and (2) recreation use during any part of 24-hour period; the current study plan uses the first definition. Eva Begley suggested that the study plan utilize the same definition that FERC uses, and offered to confirm the FERC definition of a recreation-visitor-day. This issue identified the need to create a glossary and the Facilitator responded that she was working on this task.

The participants discussed the adequacy of identified sampling days included in the study plan. The participants discussed the need to ensure that off-peak season recreation will be adequately accounted for. Examples of off-peak season recreation that should be accounted for include duck/turkey hunters and steelhead anglers. John Baas validated this concern and indicated that the sampling day schedule will be revised to achieve more evenly distribution.

The heartburn issue raised by Ron Davis at the Plenary Group that related to the re-consideration of the use of digital cameras on trails to collect use data was discussed. Ron suggested data collection efficiency could be improved with the use of cameras strategically placed on trails. The group discussed experience with vandalism, malfunction, and privacy issues associated with the

use of cameras. Doug recommended using infrared devices, which are less susceptible to these issues. One participant asked whether there would be correlation studies between the infrared data collected and the on-site sampling to validate results. The consulting team responded that follow-up is typical when using remotely collected data to validate the results. The Recreation and Socioeconomics Work Group agreed by consensus that the use of infrared devices resolves the Plenary Group heartburn issue.

Similar to sampling schedule, participants expressed concerns that early morning or late evening activities may be ignored if sampling only occurs during business hours. John Baas responded that a detailed schedule has not yet been developed, but will take into consideration this issue.

One participant asked how to consider special attraction days (e.g., bass tournaments, Labor Day, etc.). John Baas responded that these days would be flagged to account for the expected increase recreation use during these periods and would be included in the sampling design.

John Baas summarized the next steps that will occur related to this study plan, including a reallocation of the sampling schedule, development of a detailed implementation schedule, and inclusion of the plan to use infrared trail counters.

Study Plan 18 (Recreation Activity, Spending, and Associated Economic Impacts)

Tom Wegge led the discussion on study plan SP-R18 and summarized the changes made since the December Recreation and Socioeconomics Work Group meeting. He explained that there have been basically two sets of changes to this study plan – revisions made since the December Work Group meeting and suggested revisions from Patricia Watters. The study plan was revised to include the economic/fiscal impact of agency spending and operations. The geographic area of the study plan was also revised to include the greater Oroville area and will utilize the Oroville Chamber of Commerce definition, which corresponds to LAFCO's definition of this area. The other notable changes identify what sectors will be analyzed by the IMPLAN economic model. Several participants offered suggestions as to other sectors that may be appropriate to analyze, including feed stores, tack stores, bicycle shops, building supply stores, and antique stores. Many of these sectors are already implicit in one of the existing categories listed in the study plan; if not, they were included in the text. The Plenary heartburn issue with SP-R18 is the need for a modeling protocol that is being developed through a Plenary Group Task Force.

There was a short discussion on how the survey process will be incorporated into this study plan. Tom Wegge indicated that surveys for this study plan will be follow-up surveys to Study Plan SP-R13 and will include questions as to geographic origin of recreational users. It was also indicated that locals will be surveyed, but the methodology assumes that that local recreational spending patterns will not increase economic activity because theoretically local dollars would be spent in other sectors if recreational opportunities were not available.

Several participants suggested that this study plan should look at the value of people moving into the study area. Tom indicated that the approach this study plan utilizes to address this issue is to provide a historical description of real estate trends, but that it is too speculative to provide an analysis of future growth rate trends as part of this study.

Tom indicated that there are four new attachments to the study plan dealing with the IMPLAN model and general information on regional economic analyses. One participant inquired whether Hank Robison was on board to perform portions of the economic modeling. Tom responded that he has contacted Hank and Hank is interested, but nothing has been finalized, nor has Mr. Robison's role been determined. The participants agreed to the changes included in the revised SP-R18 and will await the modeling protocol Task Force output to resolve the Plenary Group's heartburn issue.

Study Plan 13 (Recreation Surveys)

John Baas noted the extensive work by the Study Plan Task Force on this Study Plan and discussed the general changes that have occurred since the last Work Group meeting, which included revisions to survey topics, the inclusion of sub-tasks, and collapsing surveys for efficiencies.

The main issue of contention associated with this Study Plan deals with the survey size and survey targets for this study. John Baas made a small presentation on survey sampling, outlining typical efforts expended on similar hydropower and general recreation planning projects. The presentation included information on standard sampling error and historical sample sizes used at other comparable projects.

The consultant team's initial approach for this study consisted of targeting four recreation groups (boat users, campers, day-users, and canoers/kayakers) and administering a total of 1,300 surveys. The survey size has been subsequently revised to potentially include approximately 2,000 surveys. The Dangermond Group suggested a considerably higher figure, approximately 3,600 surveys, which the consultant team feels is excessive.

Harry Williamson, representing National Park Service, informed the group that the proposed sample size is excessive based on other FERC projects. Pete Soderberg representing the JPA countered that he believes there is a need for a relatively higher number of surveys due to the various sub-groups of recreational users and diverse study area and facilities.

Steve Nachtman explained how the statistical efficiency gain from increasing sampling size quickly reaches a point of diminishing returns. This cost-precision tradeoff must be considered in determining sampling size for the Oroville project.

One participant inquired as to the objectives of the recreation surveys. The main objective identified by Harry Williamson is to meet FERC requirements, while Pete Soderberg suggested the objective should be to meet JPA data needs and desires. The participants discussed how the proposed survey size would meet the first objective, while it may only serve to identify future research needs under the second objective. John Baas indicated that second year surveys would be possible, if necessary.

The group discussed the concept of efficiency further, with several ideas proposed including self-administered surveys and phasing to focus survey efforts. There was a suggestion to base the survey number on the concept of "cell" size, where a cell is defined as a particular recreation activity/recreation period. John Baas confirmed that this is a viable approach where the higher the participation in a particular cell, the higher number of surveys needed.

There were also concerns raised by the group that the proposed 2,000 surveys would have implications for project timing/schedule. The suggestion is to start with a smaller number of surveys and expand as necessary. One suggested approach would consist of a two-step process where the initial surveys would be designed to understand recreational preferences/desires and subsequent surveys would be related to identifying the appropriate investments in recreational facilities. The Work Group supported some type of mixed approach, involving second year surveys as appropriate. In terms of identifying future recreational needs, John Baas reminded the participants that other studies, not just SP-R13, will be used in future development recommendations.

The decision was made to hold another sub-Task Force meeting on February 5, 2002 to finalize the sampling approach. The desired outcome of this meeting is to identify the appropriate activities (or cells) to be included in the surveys, review a sample survey instrument, and develop a plan for a phased approach to sampling.

Next Meetings

The Recreation and Socioeconomics Study Plan sub-Task Force, consisting of Doug Rischbieter, Pete Dangermond, Pete Soderberg, John Baas, Harry Williamson, Frank Cotton, and Craig Jones, will develop and finalize a survey plan for Study Plan SP-R13. Results of the sub-Task Force meeting will be distributed to the Work Group by February 8, 2002. Work Group comments on any materials must be received by close of business on Monday, February 11, 2002. If significant comments are received, a conference call will be scheduled for February 13, 2002 at 4:00 PM to resolve outstanding issues prior to a revised Study Plan SP-R13 distribution to the Plenary Group for consideration of approval at their February Plenary Group meeting.

Sub-Task Force Meeting:

Date: Tuesday, February 5, 2002

Time: 1:00 PM

Location: Dangermond Associates office in Sacramento

The Recreation and Socioeconomics Work Group agreed on the following meeting date/time:

Date: Thursday, February 28, 2002

Time: 6:00 to 10:00 PM

Location: The Eagles Hall

There was a request by the Work Group to consider holding Work Group meetings prior to Plenary Group meetings. The Facilitator indicated that this is not probable due to scheduling conflicts with other meetings.

Agreements Made

1. A consensus was reached to discuss revisions addressing Plenary Group heartburn issues at the next Plenary Group meeting and place the three critical path Recreation and Socioeconomics Study Plans (SP-R7, SP-R9, and SP-R18) on the Plenary Group consent calendar on February 25, 2002. SP-R13 will also be placed on the consent calendar if the outstanding issues are resolved in a timely manner.

Action Items

The following list of action items identified by the Recreation and Socioeconomics Work Group includes a description of the action, the participant responsible for the action, and item status.

Action Item #R41: Distribute Interim Projects Presentation from Plenary Meeting to Recreation and Socioeconomics Work Group (electronically and/or by fax). This presentation was presented to the Plenary Group on December 11, 2001.

Responsible: Patti Kroen

Due Date: February 28, 2002

Action Item #R42: Confirm the FERC definition of a recreation-visitor-day.

Responsible: Consultant team / DWR Staff

Due Date: February 28, 2002

Action Item #R43: Hold sub-Task Force meeting to finalize the sampling approach, including the identification of the appropriate activities (or cells) to be included in the surveys, review a sample survey instrument, and development of a plan for a phased approach to sampling.

Responsible: Study Plan sub-Task Force

Due Date: February 5, 2002